LESSON 5: LEADING MEETINGS

agenda
attendee
conclude
facilitate

PURPOSE

This lesson will look at the five keys to leading meetings, the nine steps to planning a meeting, the general rules of leading effective meetings and the skills to facilitate the process efficiently and effectively.

INTRODUCTION

Many people dislike meetings. They are typically unorganized with no focus on the purpose for the meeting. Attendees are unaware of their roles, their responsibilities. It does not need to be like that. You will also be given some sample tools that you can use when you are leading a project and expect to lead regular meetings with your project team.

FIVE KEYS TO LEADING MEETINGS

The five keys to leading meetings are — planning, starting, focusing, facilitating, concluding.

In this busy world today, people just don't have time to sit in meetings that are unproductive and ineffective. It is important that the leader does not just call a meeting and then see what happens. He or she must do some preparation to determine the purpose and the outcome for the meeting. Listed below are the key elements of leading meetings. Each one of these elements is critical to the success of a meeting.

1. Planning is all of the things that must be done to prepare for a meeting.

2. Starting is how you set the tone and create the climate for the meeting.

3. Focusing refers to how you keep the meeting on track.

4. Facilitating is about the many things a leader can do to involve participants, be supportive, resolve conflict, and manage differences.

5. Concluding is the way in which the leader ends the meeting and assures the participants are satisfied with the outcome and they understand what is expected of them for follow-up actions.

How do you typically plan for a meeting? Thorough planning is critical to leading a successful meeting. There are nine steps that will help you plan effectively.
They are:

1. Clarify the task of the meeting. This is a short statement describing the primary purpose of the meeting. It should start with a verb (to decide, to solve, to view, to hear, to inform, to negotiate, to listen, to review).

2. Define the desired outcomes. The desired outcome describes the expected results of the meeting — the product that participants will take away with them when the meeting is over. It can be a written plan or a new knowledge. It may include both task and process outcomes.

It is written with nouns and phrases, not verbs (an action plan, a solution, a decision, clarity, an informed staff are task outcomes; a cooperative attitude, commitment, motivated team members are process outcomes).

3. Design the sequence of meeting activities. Always plan an introduction and a summary to the meetings. Sequence the topics in order of priority, in logical sequence where information is needed to come to conclusions, alternate high-energy and low energy topics whenever possible, allow sufficient time for closing.

4. Determine who should attend, roles and ground rules. Essential attendees are those with relevant information or expertise, will make the final decision, people who are affected by the decision, and anyone who might be a barrier to implementation. Group roles are those tasks that can be shared by several people at the meeting. Some suggested roles are designated leader responsible for managing the meeting; timekeeper for keeping track of time and reminding group of planned start and stop times. Recorder keeps minutes of the proceedings. Process observer to observe behavior and make comments about how the meeting is proceeding and staying true to the ground rules. Facilitator who may simultaneously fill the roles of timekeeper, chart person, and process observer. Ground rules are guidelines for desired behavior that will enhance to process of the meeting. Examples are one person at a time talks, listen to the person who is talking, no side conversations, communicate directly and honestly, limit contributions to five minutes.

5. Decide when to meet, when to end. Decide what time the meeting is to begin and what time it is to end. Set meeting length according to the agenda items, energy needed, time, and logistical constraints. Energy usually drops after two hours. Schedule in ten-minute breaks every two hours.

6. Determine logistics, equipment, and administrative matters, and notify participants. This would include meeting location, room layout, equipment and supplies, refreshments, and notification.

7. Complete the agenda.

8. Communicate the agenda to participants.

9. Set up the meeting room.

Initially these steps might seem like a lot of work and somewhat tedious. However, when you become comfortable with the steps you will find they will become automatic. When you see the positive results of your efforts by leading effective meetings and reaching your desired outcomes, you will be admired by others because you will be showing you respect them by not wasting their time.

How you start the meeting can set the tone for success. These are activities that should be included in starting the meeting:

- Welcome and introductions.
- Statement of the task.
- Statement and display of the desired outcomes.
- Provide background.
- Review or develop the agenda and display it.
- Clarify expectations.
- List or set ground rules and display them.
- Clarify roles.

One of the major problems in leading a meeting is keeping the meeting focused on the task. There are many ways to assure that the meeting adheres to the agenda and to deal with interruptions. Here are some guidelines you can use to keep the meeting on task.

- Lead the meeting through the agenda. Take charge. Use a style of leadership appropriate to the task, the situation, and the willingness and ability of the participants.
- Introduce each agenda item. Cover time and desired results.
- Keep the discussion on track by referring to the following structures:
  - Task
  - Desired Outcomes
  - Agenda Items
  - Ground rules
  - Roles
  - Time Limit
- Focus attention by using a chart pad and easel or other visual aid.
- Maintain a “parking lot” of important items not relevant to the present discussion.
- At the end of the agenda item, briefly summarize what was accomplished and/or decided; identify unfinished business and what to do; and check for clarity and agreement.

A meeting leader is responsible to facilitate participant involvement, deal with conflict, manage difference, make sure that everyone is heard, and keep communication open. The following are tips on how to encourage participation:

- Get input from lower level people first.
- Ask open-ended questions.
- Use active listening, paraphrasing and be attentive.
- Acknowledge positive participation.
- Allow opportunities for everyone to speak.
- Be supportive of new ideas and minority views — seek first to understand before agreement or disagreement.
- Distinguish the differences between assumptions and facts.

When the agenda has been completed it is time to put closure to the meeting. Conclude by first summarizing what has been accomplished during the meeting; the compare the accomplishments with the desired outcomes; identify unfinished business and suggest ways to address those issues; complete the action plan for agreed upon actions; evaluate the meeting for things you can do better at the next meeting.

GENERAL RULES

Conducting meetings is a process. A process of setting an agenda that will lead to a specific outcome. Like any process it can be improved through understanding the skills and rules of conducting an effective meeting. The best way to lead orderly productive meetings is to follow these guidelines.

Use Agendas: Each meeting must have an agenda. It would be helpful if it was drafted at the previous meeting with one or two members then putting the detail on it prior to the actual meeting and, if possible, sent to the participants in advance. However, at an initial meeting or a onetime meeting, this would not occur. If the agenda was not developed before a meeting, spend the first five or ten minutes to do so with the attendees.

Agendas should have the following information (following the what, where, when, who, and how method):

- Agenda topics (include a sentence that would define each item and why it is being discussed).
- Presenters for each topic.
- Time allocation for each topic.
- Type of action required (discussion, decision, announcement).

The flow of the agenda will typically be as follows:

- Warm-ups: short activities used to free the attendees minds of the things they left behind to attend this meeting.
- Review of agenda so the team can add, delete, modify as needed.
- Schedule breaks if longer than one hour.
- Meeting evaluation so the team can discuss their feelings about the topics covered and if a follow-up meeting is to occur, draft the next agenda.

Each meeting should have a facilitator who is responsible for keeping the meeting focused on its purpose and moving in accordance to the time allocations. The team laders normally takes this role, however, it can be assigned to any team member and rotated when several meetings are expected. The chief responsibilities of the facilitator are:

- Keep the discussion on the topic and on the time allocations. When the time allocation is drawing near, inform the group so they can either adjust the time allocation at the expense of other items, postpone the discussion and have it as an item for another meeting, or move on as scheduled.
- Intervene if there are sidebars or when there are multiple discussions going on at the same time.
- Ensure everyone is heard and no one person dominates the discussions.
- Bring discussion to a close with summary statements.
- Act as a scribe to record key subjects, decisions made, potential agenda items for subsequent meetings and action items with who has agreed to do what and by when.
- At the end of the meeting the facilitator will draft the agenda for the next meeting with the assist of the team.
- Ensure the meeting evaluation takes place. This should include decisions on what will be done to improve the meeting next time.
- Keep the attendees in the “here and now.” Once the meeting begins everyone is expected to give their full attention. Often meetings are held away from the everyday work place to ensure members are not called away. That is not always possible, so the “100-mile rule” is established meaning each member is to behave as if they were 100 miles away from their daily routine. If members continue to disrupt the meeting by receiving message, making phone calls, and/or not returning on time from breaks the facilitator may need to remind them of this rule.

So, now your meeting has an agenda and a facilitator and the meeting is underway. Another part of effective meetings is to facilitate effective discussions. Every meeting should include mechanisms that allow for open discussion. The following techniques are provided and can be used in meetings or whenever an effective discussion is desired.

- If you are unclear about a topic, the comments said by a participant, or the argument provided from another team member, ask for clarification. Ask them to say it again using examples, pictures, diagrams, data, or just other words.

- Don't let the dominators take over the discussions. Make sure you ask those who have not had the opportunity to speak for their input. Be a gatekeeper and make opportunities for everyone to be heard.

- Before debating or defending each idea that is discussed, actively explore the idea and search for understanding before agreement or disagreement. Listening is not an easy thing to do.

- While listening, compile what has been said and then summarize and restate it to the group and ask if what was said was captured correctly.

- If the time allocation given to a topic seems to be taking longer, remind the team of the deadlines and either accelerate or postpone the time allocations.

- Learn to listen for when the topic has been "talked out." If there is silence, it could be just an opportunity for thinking about what was said. If someone repeats their point more than once, it could be that they felt they were not heard. Do not assume the discussion is over, but do not assume it is not. Intervene with questions like, do we have anything else to add to this topic or are we ready to move on.

- Periodically check to how the team is feeling about the decision making process. Check to see if the team agrees with the position, decision or summary of discussions.

- Throughout the meeting check the "pulse" for the outcome. Ask: "Are we getting what we want from this discussion? What can we do differently?"

The next step in the meeting process is to establish the record-keeping system for your meetings. This is important so you can refer back to decisions and agreements that resulted from the meetings. It can prevent the rehashing of issues previously discussed. Agendas, minutes, and the actions are included in your record keeping system.

The following is a sample agenda for your use if you are leading a project and expect to have regular meetings with the project team. It is a good tool to use when you lead a service project. The agenda incorporates several elements useful in documenting the purpose for the meetings and action and future lists.

Agenda for Project Team
Project Team: Goals: Meeting Date:
Icebreaker.
Review the agenda: Add or delete items. Estimate the amount of time for each item. Rank the item: must do today/should do today.
Status reports on individual assignments. (List individual assignments and responsible person here.)
Other reports, presentations, activities or discussions. (List them here identifying if the item type, i.e., decision, discussion, action.)
Review of the status of the project: Where are we now relative to our plan?
Assignments for follow-up activities (What? By whom? Due date?)
Upcoming events, presentations, special meetings, etc.
Review of items on the "action list."
Review of items of the "future list."
Agenda items for the next regular meeting.
Special activity schedule for this meeting.

The meeting minutes remind members of the topics discussed, the decisions made on those topics, the actions and responsible persons and due dates for those actions, and the list of future items to be included in subsequent agendas.

A sample of a Team Meeting Record is provided for your use and can be used to capture the minutes of the meeting.

Project Team Meeting Record, Part 1

Meeting
Number_______________Date_________________Location_______________

Project
name____

Mission Statement:

✓ To indicate "present"

Member
Member
Member
Member
Member
Member
Member
Member
Others attending:

Agenda: Enter key words indicating the agenda topics. Check off an item when it is completed. Items not completed will be incorporated into the next meeting.

( ) 1. Warm-up
( ) 2. Agenda review
( ) 3.
( ) 4.
( ) 5.
( ) 6.
( ) 7.
( ) 8. Set agenda for next meeting
( ) 9. Meeting evaluation

Future list: items for future consideration.

Meeting review

Pluses Minuses

Next Meeting

Date
Time
Location

Project Team Meeting Record, Part 2
Topic 1: (brief description)   Decisions/Conclusions: Next Steps:
Topic 2: (brief description)   Decisions/Conclusions: Next Steps:
Topic 3: (brief description) Decisions/Conclusions: Next Steps:

CONCLUSION

In this lesson, you have learned, the five keys to leading meetings, the nine steps to planning a meeting, the general rules of leading effective meetings and the skills to facilitate the process efficiently and effectively.

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